

PERKINS IV RESERVE GRANT REQUIREMENTS

Quarterly Progress Reports

The Reserve Grant application requires that the proposer name a Project Coordinator. The Project Coordinator will be responsible for submitting quarterly progress reports to the Director of Accountability, Budget and Grants Management in the Division of Career and Technical Education at the State Department of Education with a copy to the Regional CORE Consultant on the development and implementation of the project in their school or system. Quarterly progress report forms are included as *Pages 4-5*.

Site Visits

Two site visits (these may be conference calls if the State Government is under travel restrictions) will take place throughout the school year and will serve as a follow up to the grant application and feedback to the individual teams. These visits will be scheduled for the month following the progress report submission see *Pages 4-5*, “**Perkins IV Reserve Grant Quarterly Review and Final Project Evaluation.**” The site visit observation forms will mirror the quarterly progress report.

End-of-Project Presentation

Each school will submit an end of project **PowerPoint presentation**, which is due on June 15. Presentations should address the six questions on *Page 5*, “**Perkins IV Reserve Grant Final Project Evaluation Form.**” Please limit PowerPoint presentations to 12 slides and include notes on the slides in the PowerPoint presentation. Grant recipients may be asked to present their final PowerPoint project at the TDOE’s professional development conferences. In addition, select projects may be chosen for the best practices presentation at the CTE Summer Conference.

Expenditure of Funds

All grant funding will be by reimbursement based on invoices from the fiscal agent. Twenty-five percent of funding will be available for reimbursement from July 2, 2012- September 30, 2012. The remainder will be available for reimbursement on October 1, 2012. Final claims must be submitted no later than June 15, 2013. To expedite your reimbursements all payments will be made through the Federal Application Consolidated Tracking System (FACTS). The FACTS system allows local systems to receive timely payment. Submit the “Request for Reimbursement” and “Quarterly Request for Reimbursement” forms with each reimbursement request to the Director of Accountability, Budget and Grants Management:

Susan Cowden
Director of Accountability, Budget and Grants Management
Tennessee Department of Education, Career and Technical Education Division
4th Floor, Andrew Johnson Tower
710 James Robertson Parkway
Nashville, TN 37243
(615) 532-2846
Susan.K.Cowden@tn.gov

Administration funds are limited to 5% of the total Perkins IV allocation. Administration funds are limited to direct costs associated with the administration of the Perkins funds. **Indirect costs are not allowable.** A Budget Narrative must be included for administration projects.

Equipment is defined in Section 80.3 of EDGAR as a tangible, nonexpendable personal property having a useful life of more than one year and a minimum value of \$100. **Software is not considered.**

Expenditures made with federal funds must meet the following criteria:

- Federal funds must be used to supplement **not supplant** state and local resources.
- Costs must be necessary and reasonable for the proper and efficient administration of the program.
EXAMPLE: If a Perkins IV funded project proposed to serve 100 students, it would be reasonable and necessary to purchase materials and supplies for 100 students. It would not be necessary and reasonable to purchase materials and supplies for 200 students.
- Costs must be allocable to the project.
- If students other than career and technical education students are provided services, the costs must be prorated based on the number of career and technical students and other students.
- Costs must not be a general expense of the recipient.
EXAMPLE: If a class or activity is required to meet the graduation requirements (state or local), then it is a general expense of the recipient and would have to be supported with non-Perkins IV funds.

Reserve Grant funds may not be used to (these are common examples and not an exhaustive list):

- pay for academic programs;
- pay for individual student costs such as meals, transportation, hotel/motel, registration fees for conferences/events, etc.;
- pay for costs associated with students who are not enrolled in career and technical education programs;
- purchase promotional items and memorabilia, including coffee mugs, medals, shirts, awards, or award frames;
- purchase furniture including chairs, desks, and tables;
- purchase equipment or supplies for building maintenance; or
- pay for maintenance contracts or equipment repair.

Inventory

Very specific records to document the location of use of equipment purchased with federal funds must be kept. Being unable to produce a piece of equipment purchased with federal funds risks an audit finding, even if the purchase was allowable under Perkins. Please make sure that all property is properly tagged and included in inventory. All grantees must maintain specific property records that include:

1. a description of the property;
2. a serial number or other identification number;
3. the source of the property;
4. who holds the title;
5. the acquisition date and cost of the property;
6. the percentage of federal participation in the cost of the property;
7. the location, use and condition of the property;
8. any ultimate disposition data including the date of disposal and sale price of the property.

Be sure that any equipment that is being purchased is being used to benefit the program specified in your grant application. Records for supplies must maintain enough information about their purchases to prove all costs are necessary, reasonable and allocable, as required und OMB Circular A-87.

Please refer to the following table for guidance on when obligations are actually made before sending in claims for reimbursement.

WHEN OBLIGATIONS ARE MADE

IF AN OBLIGATION IS FOR -	THE OBLIGATION IS MADE-
Acquisition of real or personal property	On the date on which the state or sub-grantee (LEA) makes a binding written commitment to acquire the property
Personal services by an employee of the state or sub-grantee(LEA)	When the services are performed
Personal services by a contractor who is not an employee of the state or sub-grantee(LEA)	On the date on which the state or sub-grantee(LEA) makes a binding written commitment to obtain services
Performance of work other than personal services	On the date on which the state or sub-grantee (LEA) makes a binding written commitment to obtain the work
Public utility services	When the state or sub-grantee (LEA) receives the services
Travel	When the travel is taken
Rental of real or personal property	When the state or sub-grantee(LEA) uses the property

Personnel

If your grant includes salary for personnel submission of a monthly Personnel Activity Record (PAR) may be required. If personnel activities and salaries are 100% supported by this grant allocation, then PARS are not required. If personnel activities or salaries are partially covered by this grant, then a monthly PAR report must be submitted. Included in your packet is a sample PAR form. Administrative activities on the PAR form pertain to administering this grant. Administration funds are limited to 5% of the total Perkins IV allocation. Administration funds are limited to direct costs associated with the administration of the Perkins funds

Timeline

Page 6 provides a timeline to be used in local monitoring of the grant. This timeline will also be used as a checklist at the TNDOE for monitoring purposes.

**Perkins IV Reserve Grants
__1st, __2nd, __3rd Quarterly Review**

System/School: _____

Contact: _____

Grant Title & Focus: _____

Progress/Successes: *(Please number or use bullet format)*

Challenges:

Submit to the Director of Accountability, Budget and Grants Management:

Susan Cowden
Director of Accountability, Budget and Grants Management
Tennessee Department of Education, Career and Technical Education Division
4th Floor, Andrew Johnson Tower
710 James Robertson Parkway
Nashville, TN 37243
(615) 532-2846
Susan.K.Cowden@tn.gov (e-mail submission preferred)

System/School:

Grant Title:

Grant Coordinator:

Date:

<p style="text-align: center;">Perkins IV Reserve Grants Final Project Evaluation Guidelines</p>

Please complete the following Project Evaluation as the final requirement of your grant process. Email this completed form along with any other self evaluation instruments and/or collected data as specified in the grant to Susan Cowden, Director of Accountability, Budget and Grants Management, by June 15.

- 1. Describe briefly the status of progress towards your grant's stated goals (include data where possible.)**
- 2. What modifications (if any) to your original goal proposal were necessary and give a justification for those changes.**
- 3. Did you spend funds as specified in your Budget Narrative? If not, list any changes to your budget.**
- 4. Amount of unexpended grant funds: _____**
- 5. What has been the greatest success resulting from the implementation of the grant? To what do you attribute the success?**
- 6. What has been the greatest challenge resulting from the implementation of the grant? What could you have done to avoid this challenge?**
- 7. What is the most important advice you would give another school/district undertaking a similar project?**

Submit to Director of Accountability, Budget and Grants Management:

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Nashville, TN 37243
(615) 532-2846
Susan.K.Cowden@tn.gov (e-mail submission preferred)

**Perkins IV Reserve Grant
Timeline
2012-2013**

- _____ **Summer 2012** - Meet with Regional CORE Consultant to review budget and establish a timeline for project completion (order equipment, materials, etc. and plan staff development)
- _____ **September 1, 2012** - Submit revised budget to Susan Cowden, susan.k.cowden@tn.gov
- _____ **September 30, 2012** - First Quarter Progress Report due to Susan Cowden with a copy to the Regional CORE Consultant
- _____ **July 1, 2012 through October 1, 2012** – Can draw down 25 % of Grant Funds through FACTS
- _____ **October 1, 2012** – Remaining 75 % of Grant Funds available in FACTS
- _____ **October 2012** - Site Visit by TDOE Monitor (Program Area Consultant)
- _____ **December 31, 2012** - Second Quarter Progress Report due to Susan Cowden
- _____ **December 2012** - Draw down of Grant Funds through FACTS
- _____ **January or February 2013** - Site Visit by TDOE Monitor
- _____ **March 31, 2013** - Third Quarter Progress Report due to Susan Cowden
- _____ **March 2013** - Draw down of Grant Funds through FACTS
- _____ **June 15, 2013** - End of Project Presentation due to Susan Cowden
- _____ **June 15, 2013** - Deadline for Draw down of Grant Funds through FACTS